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ABSTRACT

A sectoral survey focused on ways in which vocational training plans are formulated and analysis of the cost effectiveness of continuing vocational training at the company level. It examined techniques applied to developing continuing vocational training and improving access. National surveys carried out for the retail trade sector revealed characteristics of a national nature. Analysis suggested that in spite of differences between nations and the diversity of geographical, economic, cultural, and institutional factors, the sector in all member states of the European Community would be affected by five trends: aging of the population, more diversified and sophisticated consumer demands, increasing competition, internationalization, and greater use of information technologies. In conjunction with the four characteristics common to all countries (rise in overall proportion of female workers, decrease in average age of workers, increased mobility, and frequency of seasonal work and fixed contracts), these factors would have important repercussions on employment and general organization in the sector. The need for raising qualifications and the priority given to quality of the labor force were being felt. Greater emphasis on training required new forms of organization. An increasing trend was to carry out training within the company. Generally, training was voluntary. Training expenditure was markedly less than the national average, was higher in large companies, and had increased over recent years. (YLB)

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FORCE sectoral survey on European retail trade

General context

This survey is part of the FORCE Community programme (1991-1994) which is an action programme for developing continuing vocational training in Europe. The main target groups for the programme are firms and social partners in addition to training bodies, public authorities and bodies specializing in the field.

FORCE provides support for implementing the following transnational activities in the field of continuing vocational training:

- an exchange programme;
- pilot projects on design and formulation of the make up, methodologies and common contents of courses;
- projects involved with forecasting qualification and training needs at company level;
- a Community network;
- sectoral surveys on in-company training plans;
- a statistical survey on continuing vocational training;
- analyses of joint bargaining policies;

The sectoral surveys

Three sectoral surveys were launched in the first two years of the programme: one in the retail sector, the second in the food and beverage industries and the third one in the car retail and repair industry. A fourth survey on road

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transport will be launched at the end of the year.

The sectors were chosen by members of the FORCE committee (Member State government representatives and six representatives of employers and trade unions) on the basis of a reference table formulated by TFHR, showing importance of these sectors in relation to employment, their contribution to GNP, the presence of SMEs, the effects of the Single Market.

In line with the FORCE Vademecum and the decisions taken by TFHR and CEDEFOP, the latter ensures methodological and technical coordination of the surveys, publication and dissemination on electronic media of the studies as well as the survey follow-up.

In brief, the surveys focussed on the following topics:

- the ways in which continuing vocational training plans are formulated at company level,
- analysis of cost/benefit of continuing vocational training at company level,
- agreement and practice at company and collective bargaining level,
- inter-company agreements,
- agreements between companies and public bodies and
- the techniques applied to developing continuing vocational training and improving access for poorly qualified workers, those who work part-time or whose position is jeopardized.

National surveys were carried out for each sector. They examined the national sectoral context, contain company case studies and a third part draws conclusions on the special features, trends, problems, challenges and proposals emanating from a comparative analysis of the first two parts.

A European report which adopted the same approach was drawn up on the basis of the twelve national reports.

The centres responsible for the sectoral surveys were nominated by TFHR on the proposal of the Member States who were invited to consult the social partners in the sectors concerned. Their proposals were submitted to TFHR by the members of the FORCE committee.

The centres responsible for general coordination were nominated by TFHR and meet as a group.

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CEDEFOP has the right to propose centres.

The retail trade survey

The first survey was carried out by the following research centres: the Hoger Institut voor de Arbeid, The Catholic University of Liège (Mr Jan Denys) and the SME-Documentation and Research Centre, Liège (Prof. Bragard), Belgium; the Handelshojskolen i Kobenhavn (Prof. Hanne Hartvig Larsen), Denmark; the IOVE (Professors Kioulafas and Hassid), Greece; the Services Industries Research Centre, University College, Dublin (Mr Bannon), Ireland; Forter - Confcommercio, Rome (Dr P Mattei/Ms Alessandra Gelfo), Italy; ILRES S.A. (Ms M. Wissen and Ms N. Spuden), Luxembourg; CESO I&D, Lisbon (Mr Lavalinho), Portugal and the Institute of Manpower Studies, University of Sussex (Ms Troy), United Kingdom.

Overall coordination was undertaken by CIREM, Barcelona (Mr Homs and Mr Giro), SFS, Dortmund (Dr Kruse), ITS, Nijmegen (Mr T. Reubsaet and Mr H. van den Tillaart) with the help of CEREQ, Paris (Mr O. Bertrand).

These four centres also undertook the sectoral surveys in their respective countries[1].

Collaboration with the social partners

With regard to the aims of the programme, this was the cornerstone of methodology. Consultation with social partners took place at several levels:

a. Within the FORCE committee, the representatives of both sides of industry assume an active role although they are in number inferior to Member State representatives. During the programme's implementation phase, the Committee approved the general methodology of the surveys formulated jointly by CEDEFOP and the research centres for surveys on employment and sectoral training[2]. The Committee is

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[1] Readers interested in obtaining a copy of the national study in the original language are asked to contact the research centres directly.

[2] See Vademecum

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informed at regular intervals on development of the work and the annual work programme in the surveys submitted to it. The Committee also approves the European report on each sector.

The report on the continuing training plans in the retail trade sector will be submitted during the Committee meeting in March 1993.

b. Under the aegis of their European secretariats, the social partners in each sector form a monitoring group for the duration of the survey. Representatives of the Social Dialogue (DGV) and the Directorates General involved from the Commission participate.

The monitoring group meets three to four times yearly under the coordination of CEDEFOP and expresses its opinion on the adaption of the general methodology to the specific nature of the sector, on the 50 companies selected for more thorough analysis and on the European report.

c. The social partners in the sector are invited to the meeting at which the survey is launched. The national coordination unit (NCU) linking the countries with the TFHR, issues an invitation to the conference which is also attended by the social partners.

The sectors' representatives are informed of the FORCE programme, of the exemplary character of the survey and are asked to propose companies and key spokesmen with whom the national contractor could work.

They also evaluate the national report at the second meeting organized by the NCU.

d. The European report is discussed and adopted by the plenary section in the sector, meeting at CEDEFOP where all research staff and TFHR participate.

e. Finally, the European report is submitted to the FORCE Committee composed of representatives of the Member States, the ETUC, UNICE and the CEEP.

<u>The findings of the survey</u>

The survey revealed a certain number of characteristics of a national nature such as

- the link between cultural factors and the predominance of small family shops in Greece;
- the rapid increase in multinational companies in

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Portugal;
- the high degree of innovation and sophistication in Irish case studies;
- the high level of instruction and interest in education in Denmark;
- the increased importance attached to training and to defining occupational qualifications at national level in the UK;
- serious problems in recruiting qualified staff in Germany, the Netherlands and Belgium;
- announced opening up to neighbouring countries in Luxembourg;
- the important role of the state in defining provisions, guidelines and in assisting funding of training in France;
- the extreme example of the processes of radical change in the Länder of the former GDR.

Analysis of the national reports suggests that, in spite of the differences mentioned above and the diversity of geographical, economic, cultural and institutional factors, the sector in all Member States will in all probability be effected by five trends:
. overall aging of the population;
. more diversified and more sophisticated consumer demands;
. increasing competition;
. internationalization (linked to establishment of the Single Market);
. greater use of information technologies.

In conjunction with the following four characteristics common to all countries i.e.:

. the rise in the overall proportion of female workers;
. the decrease in average age of manpower;
. increased mobility (at least in most countries and with interesting exceptions noted in the case studies);
. the frequency of seasonal work and fixed contracts;
these factors will have important repercussions on employment and general organization in the sector.

Data on employment structure by profession is insufficient; the majority of jobs require little qualification and the level of pay is beneath the national average.

In future, simple or repetitive tasks could be automated or eliminated. In order to compete, staff must be more efficient. Emphasis in future on quality and service will

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require that manpower is more efficient and more motivated. In other words, the need for raising qualifications and the priority given to quality of manpower is making itself felt.

In general, local training takes place and, with the exception of managerial staff and countries such as Germany and Denmark (where the dual apprenticeship system produces a large number of skilled workers), retail trade companies show little interest in the initial training of the manpower they recruit. They are more concerned with personal qualities. The level of manpower training is in general below average and many companies make only partial use of their employees' training potential.

In this complex situation, the way in which internal company structures respond to these trends depends to a large extent on the policies adopted by the companies. Company strategy focusses either on quality of products and/or services or on price. Concentration on the quality of services has the greatest repercussions on training.

The case studies showed that the sector is entering a new phase. In a large number of companies it may be defined as that of post-self-service in that they combine to the largest possible extent the advantages of self-service (for the company and customer) and of service (for the customer). This has implications for training as the role varies in accordance with the commercial concept and the products sold.

In a large number of companies studied commercial strategy has changed recently through improving the quality of products and services, through seeking new customer groups or through seeking a new company image. Generally this trend has been in step with the increased importance of staff training and in particular for sales staff. Training focusses on knowledge of the products and on behaviour adapted to the new image which the company wishes to promote.

It can be said that the more successful and more prominent have managed to integrate training to a greater degree in their strategy and have a more global view of developing human resources.

It is only natural that in many cases one training aim has focussed on adapting to new commercial strategy and to promoting a new company image. This is, however, a recent development; it should not be forgotten that up to the

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present training has focussed on new recruits and in particular on management trainees.

Training organization

Half of the companies studied stated that their training needs and aims were formulated in these plans. Needs were evaluated in many different ways and very often by only one responsible manager.

In some cases management makes a specific study throughout the company. An ad hoc group can be created with representatives from the different units. There are also examples of more systematic approaches with specialized study groups responsible for ensuring that training needs are in line with general company aims and that training content matches staff needs. The identification of training needs can also be linked to formalizing practices and procedures and to formulating and updating job descriptions.

This procedure can involve both specialists in the area and shop managers. In other cases training needs are assessed in the course of annual interviews with employees. In other cases, needs are analysed with the support of external consultants and are linked to an overall analysis of human resource management.

The greater emphasis that is being placed on training requires new forms of organization. It should be stressed that a large number of the companies examined had no training structure up until recently when new measures were adopted to set up training services and centres, to identify aims, establish training plans and to formulate training programmes. In 70% of the companies studied, major change took place within the past seven and even the past two years. 12% of companies had no training service in 1985.

There is an increasing trend to carry out training within the company and to make it the responsibility of the company and not of external bodies. This is a logical

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consequence of wishing to link company training and strategies to the image it wishes to promote. The trend to carry out training internally has resulted in the creation of training centres offering an array of training programmes to company staff (or to a network of small companies). Yet another aspect concerns the new training role of managers and experienced staff: this requires an adaption of training and may conflict with other tasks.

Training within the company may also go hand in hand with decentralizing training responsibilities at regional and retail outlet level where a training manager may be found. At local level the task is one of identifying needs of organizing and implementing training schemes, the centre remaining responsible for content and training materials. The decentralization of training responsibilities and allocating these to management staff may conflict with short term economic aims.

The involvement of the trade unions and staff representatives in planning and supervising training expenditure has been the subject of written agreement in several countries. This seems to be more the case in the area of initial training, particularly where specific retail training does not exist. The social partners have jointly launched an initiative to create and improve training programmes.

As far as continuing training is concerned, and this is increasing in importance, this is an area of little conflict. Often, however, staff representatives are not directly involved in planning or implementing training, at least at retail outlet level.

The number of independent workers is decreasing constantly but still constitutes some 20-30% of employment in the sector and even 80% in Greece. Traditionally, they are scarcely affected by training. Nevertheless, major changes are underway, particularly when independent retail outlets form chains: then training for members becomes an essential issue on which the future of the chain depends. Training is regarded as an important cohesive factor for the chain. This remains however a problem as many small shop owners neither have the time to take part in training or do not see the need.

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In larger companies, training opportunities are most important for sales staff (80% of cases studied), and particularly in the foodstuff sector and to a lesser degree in super- and hypermarkets, where there are fewer sales staff. Staff in self-service outlets are least affected by training.

The increased importance attached to training as an integrating factor in a global strategy presupposes that greater attention is played to training all staff. Some companies are commencing to train part-time staff often working under pressure and in contact with customers at peak periods. Two training schemes targeted in particular ethnic minorities and a "multicultural" sales environment.

Several training schemes were launched to promote women and to support them in becoming aware of their potential, their personality and their occupational interest in order to upgrade them and improve career prospects. There are also special training programmes for checkout staff.

These activities could not be quantified by the study nor could the impact of training be assessed in terms of the number of staff trained.

Generally, training is voluntary, but trainees are selected by management. Where training is organized for all staff, all are obliged to participate.

As far as content and methods are concerned, training schemes are usually modular in nature. Contents correspond to the market situation and emphasis is placed on products and sales techniques, the cultural and organizational environment of the firm, at times on costs, profit margins, etc and less frequently on ecological and environmental issues.

If technology assumes an increasing role in competition and in management of retail companies, little attention is devoted to it in training schemes. This may result from the increasing user friendliness of new technologies.

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As staff has little training prior to embarking upon this scheme, they benefit from a more tangible and less academic approach.

Five educational methods were identified:

- self-training, using correspondence courses, manuals and audio-visual equipment;
- work situation simulation;
- running mock companies (three companies in the study);
- alternance courses, including long periods of practical experience and tutorial assistance (used frequently in training management);
- small meetings to discuss topics of interest to all at work. In this case, an interesting experiment involved opening the shop half an hour later each week and offering training and information to all of the staff in this period.

Costs and evaluation

With regard to costs and efficiency, the case studies produced a small and inadequate quantity of information. One third of the companies studied could provide no information. Data compiled on remaining companies is incomplete or incoherent: some of them link expenditure to total wage costs, others to turnover, others to number of staff.

Nevertheless, the following points can be made: training expenditure in the retail trade sector is markedly less than the national average; expenditure is higher in large companies than in small companies; expenditure has been increasing over recent years; expenditure is higher in the enterprises studied than in the sector in general. In all likelihood this may be said for the majority of European countries.

The response to the question of assessing economic gain and in more general terms the benefits of training were unsatisfactory. The majority of companies did not comment. Certain companies referred to the assessment of training courses by the students themselves, to the link with the posts trained staff occupied or to the promotion of trainees. One company gave assurances that it would pay

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greater attention to this complex issue which should be approached from a global point of view.

The retail trade sector which is currently undergoing transition on account of increased competition, company purchases and amalgamation, must counter certain factors hindering the making of training more general such as working conditions which account for high staff turnover and the negative image of the sector for young people and those who are better trained.

On the other hand, the absence of links in the majority of countries with the initial training systems and difficulties in defining continuing training activities would justify giving greater consideration to the specific nature of the training needs in the retail trade sector. Certain training activities are of a very general nature (behavioural skills and a broad knowledge of retail trade management), others are extremely specific and require only short informal training (products, companies, image). In the latter case there is a risk that continuing training in the retail trade does not remain narrow and specific in nature which has a negative effect on the individual development of the worker and on promotion and mobility opportunities. This means that, in a general sense, training does not attempt to respond to individual staff needs.

This runs counter to the recommendations contained in the European Memorandum on vocational training formulated by the social partners in the retail sector in 1988. The call for minimum training standards in the memorandum would seem to confirm this.

CECD-EUROFIET consultations

The consultations were held to assess the European report and its follow-up both from the point of view of the FORCE programme and the Social Dialogue.

On the employers side, in addition to the European secretariat of the CECD/FEWITA/GEDIS represented by Mr K. Loftlund, Mr. Soren Henriksen and Mr P. Rasmussen (Danish Employers' Federation for Office and Trade), Mr de Vadder (Fedis and member of the Management Board of CEDEFOP), Mr F. Hoppe (Dansk Supermarked Indkoeb A/S), Mr A. Drakatos (ATA), Mr Kruger and Mr Malcher (HDE), Mr J. D. Aymat (Confederation Catalana de Commerio), Ms P. Saint Léger (Fedimas), Mr F. Falcini, Mr G. Togliani and Mr G. Regaldo (Forter-Confcommercio), Ms M. Quinn (Superquinn), Dr J. J.

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Fokke (Raad FGB), Ms a. C. Arthur (FCRP), Mr P. Morley (National Retail Training council), Ms J. Rubin (W H Smith Ltd), Mr P. Kerremans (NCMV), Mr. Koedinger (Cahmbre de Commerce du Luxembourg), Mr. T. Bridge (John Menzies (GB) Ltd), Mr A. Clarke (J. Sainsbury PLC) and Ms S. A. van den Bosch (KNOV).

For employees, in addition to the European secretariat of Eurofiet, represented by Ms B. Tesch-Segol and Ms P. Clarke (Geneva), the following also participated: Mr R. Varnier (Force Ouvrière), Ms Dibar (FdS-CFDT), Mr B. Connor and Mr J. Rees (USDAW9, Mr Owen Nulty (IDATU), Mr A. Zilli and Mr F. Zampagni (UILTuCS), Mr M. Cesino (FISASCAT), Mr Treves (FILCAMS), Mr F. M. Carmona (FETC-UGT), Mr V. H. Sequeira (SITESE), Mr E. De Deyn (SETCA), Mr Sauvage (CNE), Mr F. Wyckmans (LBC-NVK), Mr W. Drijver (FNV), Ms D. Nièles (OGB-L-Department of private employees), Mr. J. Hoppe (HK), Mr A. Fragopoulos and Ms M. Papaioannou (OIYE), Mr Jens Vojta (DAG), Mr D. Steinborn (HBV), Mr G. Silvestro (FISASCAT) and Mr G. Fernando.

DG V, DG XXII and Eurostat were also invited.

Following discussions chaired by Mr E. Piehl, Director of CEDEFOP, Mr C. Politi, Deputy Director of CEDEFOP and Mr G. Kintzelé (TFHR, Unit 5, who has overall responsibility for the FORCE programme), the social partners formulated the following joint opinion which was submitted to the FORCE committee.

Joint opinion of the European social partners in the retail trade sector on the survey on continuing training in the sector.

EURO-FIET and CECD, representing at European level employers and employees in the retail trade sector which constitutes some 12% of employment in the Community welcome the survey carried out by the Commission within the FORCE programme on training and express their satisfaction in this respect.

They underline the value of the methodology applied, involving social partners at all levels and throughout the various stages of the work.

As this is the first survey carried out since adoption of the FORCE programme in 1990, it is particularly important for future survey and for the development of Community training activities.

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Training should be considered in a European socio-economic context, in a national context and in relation to the structure of the company, the make-up of staff, labour contracts and the needs of employers and employees. A sectoral approach is required in order to place training needs within the general context of labour conditions and perspectives.

This implies that the relevant social partners should be consulted at national and European level on the development and implementation of training activities.

National round table conferences which have been proposed will provide opportunity for discussion of national and European reports.

The survey of 55 company case studies and national reports have shown the need to apply the principles contained in the joint EURO-FIET/CECD memorandum on training in the retail trade sector.

Application of these principles at a national and European level and the existence of manpower which is skilled and capable of responding to future trends in the retail trade remain an absolute priority for both EURO-FIET and CECD.

The survey finding should be distributed as widely as possible and EURO-FIET and CECD should help in achieving this. To this end, they will meet before the next FORCE committee meeting to discuss how the European Communities, employers and employees should make best possible use of the survey findings.

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